



STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

Working Title

Data Processing Technician

Job Code Title

Data Processor Technician

Pay Band

03

Job Code Number

439233

Information Technology and Processing Division

Processing and Retention Operations Bureau
Data Capture Unit

Fair Labor Standards Act

Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Information Technology and Processing Division serves as the operational foundation for the department's business units. Through secure, up-to-date computing and processing environments the division's Information and Technology Services Bureau (IT) and Processing and Retention Operations Bureau (PRO) contribute to the department's overall efficiency in document and payment processing while ensuring confidentiality, integrity, and availability of taxpayer data, whether in paper or electronic form. In providing these services, the division enables the department to meet its business objectives and facilitates its mission to serve the citizens of Montana. The division also includes the Administrative Team. The Processing and Retention Operations Bureau ensures secure handling and delivery of taxpayer information, payments, and data to the appropriate systems and staff. The bureau is organized into four units providing tax return and payment processing including Account Maintenance and Cashiering, Data Capture, E-Services, and Mailroom and Records Management. The Data Capture Unit is responsible for ensuring accurate and secure data capture of taxpayer information.

Job Responsibilities

The Data Processing Technician provides training and leadership to unit staff, resolves data entry problems, and locates and resolves errors. The incumbent ensures the accuracy of taxpayer data entered into tax databases, accurate transfer of entered and verified batches into the master tax system, and assists with manual records management. Provides a range of general services in support of mail services, accounting, records maintenance, or taxpayer registration functions and performs a variety of other duties as assigned. The position reports to the Data Capture Unit Manager and leads other processing assistants and technicians within the work unit including permanent, seasonal, and temporary staff.

• Data Processing, Error Correction, and Data Transfer 50%

1. Enters data for multiple tax types into the appropriate database through specialized data entry software or directly on-line into the master tax system from batched taxpayer documents. Creates taxpayer accounts based on the tax type and system requirements.
2. Validates returns according to type by resolving errors and discrepancies and verifying the completeness of batch postings. Reviews data for errors, reconciles batches, and updates customer information.

3. Enters priority tax documents and miscellaneous tax types. Ensures secure handling and delivery of taxpayer information and system reports to appropriate staff.
 4. Maintains logs to track batched tax returns and measure productivity by receiving and distributing incoming batches, recording type and number completed on log sheets and spreadsheet, and reconciling number and type of tax returns between logs and spreadsheet.
 5. Transfers data files of batches to appropriate processing systems by creating database transfer files of all input and verified batches.
 6. Resolves transfer problems by locating and correcting errors in the batched returns. Errors not found during the validation process are indicated by failure of the transfer process.
 7. Reconciles data transfers in the master tax system to make sure the transfer was completed by correcting any errors that prevented completion of the transfer. Performs data backup and recovery procedures as required using data transfer and backup systems.
 8. Identifies and resolves errors, discrepancies, and omissions as necessary to maintain accurate and complete batches by identifying and eliminating duplicate paper records and verifying that required records or documents are present and complete.
- **Data Capture Lead 35%**
 1. Troubleshoots data processing services and processes to identify training and technical assistance needs by monitoring ongoing processing. Responds to problems referred by data processing staff and tracks errors to determine individual training needs.
 2. Provides one-on-one training to new staff by giving instructions on the functions of data entry software, procedures for entering data into the system, and answering questions. Provides feedback to staff and initiates added training as needed.
 3. Sets the work pace by reviewing work plans and priorities and monitoring progress. Distributes data through one-on-one and group meetings.
 4. Plans and assigns work based on unit priorities and the abilities of staff members. Reviews assigned work to ensure task are completed accurately and timely.
 5. Provides input to the supervisor on staff performance. Suggests performance improvement, carries out actions as assigned, and reports outcomes of performance improvement actions.
 6. Assists the senior data processing coordinator write and maintain desktop instructions for each tax type, form type, and data entry and data transfer process.
 7. Works with other units to organize schedules, materials, equipment, and staff and improve services by providing cross-training, advising staff, and sharing resources as needed. Trains and advises other staff to promote cross-training in data entry.
 - **Processing Support Services 10%**
 1. Assists with taxpayer registration by updating or adding taxpayer account information from paper documents or electronically filed tax returns using system registration functions for a limited number of tax types.
 2. Assists with processing files to ensure easy access, efficiency, and completeness of records maintenance. This includes receiving and verifying information, sorting and routing information, searching for lost files or contents, retrieving files for requestors, and closing or purging files.
 3. Assists with routing mail and other documents, processing general taxpayer information by setting up database files, receiving and verifying information, entering data, and data quality control measures such as tracking productivity.
 4. Takes part in testing new or changed processes to find and solve problems and help determine the effectiveness of the process.
 5. Responds to requests and questions from other units by locating and providing requested information and referring specific and technical issues to appropriate staff.
 6. Ensures secure handling and delivery of taxpayer information and reports to appropriate staff.
 - **Other Duties 5 %**
 1. Performs a variety of other duties as assigned.

Job Requirements

To perform successfully as a data processing technician the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. Skills in multi-tasking; paying attention to details and accuracy; organizing multiple tasks within short and inflexible timelines; mathematics; providing timely and effective written, verbal, and interpersonal communication; customer service; conflict resolution; compiling and analyzing data from multiple sources; following written and oral directions and instructions; identifying and correcting data errors; and word processing, spreadsheet, and database applications are required. This position works with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job.

This position requires general knowledge of automated data processing systems, records management, office operations, and customer service standards. The work requires knowledge of department operations and tax types.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is graduation from high school or GED and two years of job-related work experience in processing documents or information into computer software programs or general office/clerical.
 - Other combinations of education and experience will be evaluated on an individual basis.

Department Core Values

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

Working Conditions

Must work under time constraints, be able to maintain numerous projects at one time, and determine priorities on a daily basis. At times, the incumbent will deal with angry or difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. This position requires considerable computer and keyboard use and being seated for extended periods of time. Due to peak processing seasons, incumbent may work in excess of 40 hours per week which may include evenings and weekends. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

Special requirements

- Background Examination: Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- Compliance with All Appropriate Montana Tax Laws: An employee's tax status must be current.

This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.

Division Administrator Review: The statements in this job profile are accurate and complete.

Signature: Margaret Kauska, Division Administrator Date: August 2010

Human Resource Director Review: The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: August 2010

Employee: My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: _____

Date: _____

Name (print): _____